

**CASE MANAGEMENT/ISS DRAFT AGENDA**  
**BROCKTON, MA October 15 - 18**

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**Introduction:** This three and a half day workshop will combine site visits, content sessions and hands-on activities which will train staff on developing a good case management system that utilizes the ISS (Individual Service Strategy) as a road map to move young people through a continuum of appropriate services/activities that address their individual needs. This workshop will go beyond the documentation included in a case file and will look at quality and content. Workshop participants will learn how to set goals, monitor, and review ISP. Emphasis will be placed on how to involve the young person in the development and implementation of his/her own plan with the case manager serving as more of a coach to the process.

**Intended Audience:** Since this workshop will be held twice, once on the East Coast and once on the West Coast, each site may send two people. It is recommended that for this to be an effective training, that each site send their lead case manager as well as someone who oversees the system. This training will be structured as a "train the trainer model" with the idea that attendees will be able to pass on the information received to other case managers and relevant staff at their site.

**Participants are asked to bring:**

- A sample of the Individual Service Plan that they are currently using
- Examples of Assessment Tools
- A few representative case files (with names blacked out) for peer review
- Three major challenges that they have faced or are facing in developing a case management system
- Examples of things that are working well

**Presenters:**

**Hotel:** Sheraton Braintree Hotel  
37 Forbes Road  
Braintree, MA 02184  
781/848-0600

***UNLESS NOTED ALL WORKSHOPS WILL BE HELD IN THE HOTEL***

**DAY 1** Tuesday, October 15 - Brockton

8:00 Continental Breakfast at the Hotel

8:30 Introductions and overview of the workshop

9:15 - 10:00 **Session 1: Principles & Practices of Youth Development:** Guiding adolescents successfully through the transition to young adulthood.  
Description:  
Handouts:

10:00 - 10:45 Group activity: Assessing how the principles and practices of youth development are embodied at your site. Matching activities available through your program to the needs of the youth that you are serving. Introduce Sample Case Study? Could we break into teams and have each team have a case study that they follow through to the end and then report out on?

10:45 - 11:30 **Session 2: Overview of the BI-LEVEL Approach -**  
Anne Adams  
Description:  
Handouts:

12:00 - 1:30 Lunch on your own

1:30 Leave for Brockton RISE Center

2:00 - 5:00 Brockton Site Visit; see attached itinerary

5:00 On the Bus Review of the day and next day overview

**DAY 2:** Wednesday, October 16, Brockton

8:00 - 8:30 Continental Breakfast at Hotel (included in price of room)

8:30 - 9:15 **Session 3: Process & Performance Measures -**  
Gregg Weltz  
Description: The integration between case management and performance, particularly around goal setting and achievement oriented outcomes.  
Handouts:

9:15 - 10:00 Group Activity

10:00 - 10:15 Break

10:15 - 11:15 *Session 4: Interview Skills:* How to Elicit Information

Description:

Handouts:

11:15 - 12:00 Group Activity - Possible use of Video Tapes

12:00 - 1:30 LUNCH PROVIDED at Hotel

2:00 - 2:45 *Session 5: Implementing the Case Plan*

Description:

Handouts:

2:45 - 3:30 Group Activity

3:30 - 3:45 Afternoon Break

3:45 - 4:15 *Session 6: Using the MIS System as a Tool to Achieve Goals*

Description:

Handouts:

4:15 - 5:15 Group Activity - Developing a process for consistent and on-going case management

**DAY 3** Thursday, October 17, Brockton

8:30 - 9:00 Continental Breakfast at hotel

9:00 - 9:45 *Session 7: Assessment: The Foundation of Case Management*

Description:

Handouts:

9:45 - 10:30 Group Activity [To be defined]

10:30 - 10:45 Break

10:45 - 11:30 *Session 8: Resource & Linkage* - Anne Adams

Description:

Handouts:

11:30 - 12:15 *Session 9: Record Keeping*

Description:

Handouts:

12:30 -1:30 LUNCH PROVIDED at hotel

1:30 - 2:15 *Session 10: Case Planning*

Description:

Handouts:

2:15 - 3:00 Group Activity [To be defined]

3:00 - 3:15 Afternoon Break

3:15 Leave for Boston Site Visit

4:00 - 5:30 Boston Youth Opportunity Site Visit (E-TEAMS  
Demonstration)

5:30 Travel to Fanuiel Hall - Downtown Boston

9:00 p.m. Bus returns to hotel\*

\* Individuals who do not wish to stay in Boston may take the Red Line back to Quincy and take the shuttle bus to the hotel which is located about 5 minutes away from the subway station.

**DAY 4** Friday, October 18, Brockton

8:30 Continental Breakfast at hotel

9:00 - 10:00 *Session 11: Taking It Home - How to Transfer  
Knowledge to entire staff*

10 - 10:30 Break (Allow folks to check out of hotel)

10:30 - Noon **Case Study Reviews**